



Your Longhurst Experience

(and the **technology** we use to make your life easier)



Initial Conversation

-  **Calendly** diary invitation
- Physical face-to-face or via **Zoom** 
- Digital Life Today document to be completed ahead of our first meeting
- Terms of Business provided outlining our services and fees








Accept our service proposal

- Client Agreement e-signed via **DocuSign** 



Meeting #2 - Vision

-  **Calendly** diary invitation
- Physical face-to-face, or via **Zoom** 
- Book gift #2

Meeting #3 - Planning

-  **Calendly** diary invitation
- Physical face-to-face, or via **Zoom** 
- Financial planning software exercise:
 - **Voyant**  cashflow forecast
 - **Timeline**  sustainable income forecast
- Talk through your financial planning report
- **Loom**  video produced for you, as a re-cap on **Voyant**  & **Timeline**  forecasts
- Together, we agree the next steps


Meeting #1 - Exploration

-  **Calendly** diary invitation
- Physical face-to-face, or via **Zoom** 
- Book gift #1
- Formal service proposal then sent to you to read

MyLonghurst Client Portal

- Invitation to join **MyLonghurst** 
- Digital information pack downloaded & completed by you ahead of Meeting #2

Financial Plan Production

- Regular progress updates communicated to you
- Financial plan and all supporting documentation uploaded to your **MyLonghurst**  portal to read ahead of Meeting #3

Implementation Stage

- Longhurst oversee the implementation of all new advice
- Where applicable, Monthly Retainer set up via **GoCardless**
- Welcome to Longhurst email sent
- Invitation to our added-value services
- 10 trees planted on your behalf through our **MoreTrees** partnership
- Treating Clients Fairly questionnaire digitally sent through **SurveyMonkey**

Annual Planning Service

Comprehensive planning service covering

- Face-to-face review meeting(s)
- Sound-boarding & financial coaching
- **Voyant**  & **Timeline**  forecasting
- Wealth management
- Investment management
- Tax planning
- Disaster planning
- Mortgage reviews
- Estate & legacy planning
- Income strategies

A deeply personal relationship consisting of

- Ad hoc 'Hello Calls'
- Monthly newsletters
- Birthday cards and chocolate brownies
- Anniversary and special occasion flowers
- Social lunches
- Postcards
- Investment Lifeboat Drills
- Children's well-being journals
- Invitation to Longhurst events

Plus added-value services delivered through external partners

- Travel & adventure concierge
- Executive coaching
- Good-giving planning

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